Manager Self Service in Bear Trax: Time & Absence Approvals, HR Transactions, & More

For All Managers of Direct Reports

Terminology

- **Manager Self Service—Transactions that managers of direct reports can initiate at any time without assistance from others.**

- **Trainstop—An ordered work flow you must follow to complete certain transactions.**

- **Transfer—An action to change an employee's status and update relevant employment information.**

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Key Concepts

- **MSS includes automatic workflow and electronic approvals.**

  Employees & Managers can see where a process is in the workflow at any time.

- **Manager Self Service transactions include:**

  - Employee Time Approvals for non-exempt employees

  - Absence Management

    - Manage Absence Records

  - Personal and Employment

    - Transfer & Change Location

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Key Concepts

- **In addition to time and absence approvals, Managers can complete HR transactions (transfers, salary change, etc) within their department.**

- **Bear Trax replaces the Change of Status form. Managers can complete the following actions as a Transfer:**

  - **Position Change**

  - **Salary & Grade Changes**

  - **Location Change**

  - **Work Schedule**

  - **Working Hours**

HR Transactions

Instructions for Managers

Bear Trax for HR Transactions in your department

Bear Trax replaces the Change of Status form.

- Use Bear Trax to initiate an HR transaction (transfer, change manager, change location) within your department.

- In-Department HR Transactions include:
  - Position Change
  - Salary & Grade Change
  - Manager Change
  - Working Hours & Work Schedule
  - Location Change

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The Transfer Process

The Transfer process consists of a series of steps set up as Trainstops.

- **The Transfer process starts with *a series of conversations* between Manager, Employee and HR *outside of Bear Trax.***

  - **All activities (except change in work schedules and location) initiated by a manager go to the manager's immediate supervisor for approval.**

    - The request continues up the supervisory hierarchy to Vice President.

    - Following VP approval the request goes to Budget and then HR for approval.

    - Payroll staff are notified.

- **Work schedules and location changes are auto approved. All other transactions follow a workflow that requires HR and/or Payroll approval.**

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Add an Assignee to the Transfer Workflow

Managers can add an assignee (ie: Administrative Assistant) to the Transfer workflow for assistance completing the process.

- **Follow these steps to add an assignee to the workflow:**
  - **Initiate the Transfer of the Employee.**
    - **Select the employee and enter basic details.**
    - **Skip through the Transfer steps by clicking Next on each page.**
    - **Select Add an assignee and identify that person.**
    - **Insert an assignee to the workflow *above* the initiator and add a comment providing direction for the assignee.**

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Absence Management Fast Facts for Managers

- **All Absences must be documented in Bear Trax.**
  - It is the employee's responsibility to submit absence requests in Bear Trax.
  - It is managers responsibility to ensure employees have submitted absence requests.

- **Absences automatically populate within the employee's Time Card.**

- **Managers can view team member's current absence balances.**
  - Absences cannot be submitted without sufficient balance.

- **Never modify an employee's absence request. Reject it with comments for employee modification.**

- **Managers can submit an absence event on their employees' behalf in special cases.**

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Time Management Fast Facts for Managers

Employee time cards will appear in manager's Notifications where action must be taken.

- Manager actions include Accept or Reject with comments.
  - If time card requires edits, select Reject and add Comments.

  - *It is the employee's responsibility to ensure time reported is accurate.*
  - *It is the manager's responsibility to confirm employee time reported is accurate.*

Remember! Managers cannot create, edit or submit timecards on their employees' behalf.

If an employee is unable to submit their time worked, the Manager *must* notify Payroll to ensure employee is paid.

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Time Management Best Practice

- **If you reject an employee's time card, you <u>must</u> enter a comment when sending it back for revision.**

- Make sure that the employee resubmits the time card and that you approve the time card by the **Monday at 9:00 AM** deadline.

  - For employees that do not regularly check email, please *reach out to make them aware* that adjustments need to be made.

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Process for Time Card Approvals for Employees with Multiple Assignments

- Employees with multiple assignments will indicate time worked for each position and submit time card bi-weekly.

  - Must be completed by Friday at 1:00 PM.

  - The time card is routed first to the Primary Line Manager (the manager of the employee's primary assignment).

- Primary Line Manager follows regular approval process and Approves, **adding a comment** indicating the position for which time is being approved.

  - Must be completed by Friday at 3:00 PM.

  - The system automatically routes the time card to the Secondary Line Manager.

- Secondary Line Manager receives notification of time card. Secondary Line Manager follows regular approval process and Approves, **adding a comment** indicating the position for which time is being approved.

  - Must be completed by Monday at 9:00 AM.

  - The system automatically submits time card to Payroll.

*Note! *In the event of a 3rd or 4th time card assignment, the Secondary Line Manager must "Add Ad Hoc Approval" for each pay approval.*

  - Subsequent Manager data can be obtained from HR or Payroll.

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Fast Facts for Managers: Reassigning Approvals

If managers will be away and unable to respond to employee requests, managers must **temporarily reassign approvals to another appropriate employee.**

- Reassignment typically goes to the *next level administrator* or to the individual acting on a managers behalf *with signature authority*.

Tasks can be reassigned in two ways:

- Reassignment of **all** time/absence submissions during a temporary timeframe.

  - To reassign all submissions: Notification Icon > HCM > Select Name > Select Preferences > Enable Vacation Period > Reassign > Select designee

- Reassignment of **items one by one**.

  - To reassign items one by one: Open time card > Dropdown menu > Actions > Reassign > Select designee

*Note! Reassign removes you completely from the approval workflow. You will have **no visibility on approval status** and **will lose all access to notifications for all submittals by your direct reports** during the reassignment period! All Bear Trax submissions will be seen by the designee.*

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Manager Reports for Team Time

Team Time Reports are available from the Tool Menu.

Navigator > Tools > Reports and Analytics > Catalog Icon 📖

- **Detailed Time Card Manager Report**

  Lists direct reports who have made time card entries

  - **Best Practice!** *Run the Detail Time Card Manager Report mid-pay to view employee entries.*

- **Missing Time Card Report**

  Lists direct reports who have not submitted time cards

  - **Best Practice! See Payroll calendar on SSU website for pay period dates.**
  - **Report is based on pay period dates, not the paydate.**

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The End

Thank you for reviewing this process overview!

Please contact your Bear Trax Department Coordinator or your manager for more information.